

ATTACHMENT 1
PERFORMANCE WORK STATEMENT
FOR
EPA REGION 4 INFORMATION RESOURCE MANAGEMENT SERVICES SUPPORT

PART I - GENERAL INFORMATION

A. BACKGROUND

The mission of the U.S. Environmental Protection Agency is to protect human health and the environment. The Agency is comprised of a Headquarters office located in Washington D.C., as well as ten regional offices located throughout the country. EPA Region 4 is located in Atlanta, GA and supports the states of Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina and Tennessee.

EPA Region 4 is comprised of the Office of Regional Administrator and 8 divisions/offices, which include the following:

- Office of Regional Administrator (ORA): provides the overall supervision of the region and is responsible for planning, programming, implementation, control, and direction of technical and administrative aspects of Region 4 programs and activities.
- Air and Radiation Division (ARD): responsible for achieving cleaner air, healthier communities, safer food, and emergency readiness.
- Enforcement and Compliance Assurance Division (ECAD): responsible for developing and implementing Region 4's enforcement and compliance assurance programs.
- Laboratory Services and Applied Science Division (LSASD): through its scientific and technical support services, serves as the primary provider of scientific and technical expertise and environmental data for EPA Region 4 program offices.
- Land, Chemicals and Redevelopment Division (LCRD): responsible for preserving and restoring land using the most effective waste management and clean-up methods available.
- Mission Support Division (MSD): responsible for core business operations of the regional office such as financial management, human capital, procurement, grants, facilities/property management, planning and environmental indicators/innovations, information technology and records management.
- Office of Regional Counsel (ORC): provides legal advice and counseling for Region 4; assists regional program offices in criminal enforcement activities; plans, coordinates, and monitors the Region's enforcement and compliance assurance program, including federal facilities; and provides leadership in implementing national enforcement activities and initiatives.
- Superfund and Emergency Management Division (SEMD): protects the public and the environment by cleaning up the nation's worst hazardous waste sites. EPA Region 4 Superfund's cleanup activities include both short-term and emergency cleanups as well as long-term cleanups at targeted sites.
- Water Division (WD): responsible for permitting and enforcement of facilities that discharge to water bodies; working with states, tribes and local governments to protect our coastal areas; helping to provide safe drinking water to our citizens; and implementing and overseeing regulatory programs in our states.

The 44 U.S.C. Chapter 31 - Records Management by Federal Agencies requires all federal agencies to create records that document their activities, file records for safe storage and efficient retrieval, and dispose of records according to Agency schedules. EPA Region 4's records management system is multifaceted and comprised of multiple libraries, records centers and file rooms. Some of the divisions and program offices directly manage their own Records Management programs however support for all divisions is overseen by the OPM Information Access Section. While agency staff provide overall management of the records management program, EPA requires support from the contractor in the following areas:

- Regional Library Management
 - EPA Region 4 Library
- Regional Records Management Support
 - Support of all nine (9) divisions/offices

Inherently Government Functions: The contractor shall submit all analyses, options, recommendations, reports, and training materials required under this contract in draft for critical review by the Contracting Officer, Project Officer, and/or Alternate Project Officer. The Government will make all final regulatory, policy, and interpretive decisions resulting from contractor-provided technical support under this contract and make the final decision on all contractor-provided recommendations. The contractor shall not publish or otherwise release, distribute, or disclose any work product generated under this contract without obtaining EPA's express advance written approval. When submitting materials or reports that contain recommendations, the contractor shall explain or rank policy or action alternatives; describe procedures used to arrive at recommendations; summarize the substance of deliberations; report any dissenting views; list sources relied upon; and detail the methods and considerations upon which the recommendations are based. The contractor shall not provide any legal services to EPA under this contract, absent express written advance approval from EPA's Office of General Counsel.

EPA Region 4 Library: The EPA Region 4 Library serves as a focal point for access to the Agency's collection of monographs (i.e., books, technical reports, and documents), serials (i.e., annuals, journals, and newsletters), materials produced in microform, law related resources, and electronic information services. The library provides access to existing information sources for EPA staff, EPA National Library Network and to the public (with the exclusion of library law services). The EPA National Library Network was designed to support EPA staff in the program and regional offices and provide them with access to environmental information and related scientific, technical, management and policy information. The EPA National Library Network establishes policies and procedures to oversee library operations, library staffing, core materials to be housed in each library, as well as other library requirements.

Region 4's backup for core library functions is the Andrew W. Breidenbach Environmental Research Center (AWBERC), located in Cincinnati, Ohio. AWBERC provides backup services, as needed, such as interlibrary loans, cataloging, on-line literature searches, and reference/research requests that are not physically maintained in the Region 4 Library. The AWBERC houses the largest scientific and technical collection in the EPA Library Network, including more than 25,000 books, over 600 journal subscriptions, and 2,000,000 technical reports. The AWBERC library staff support EPA laboratories and research programs with a diverse collection of materials in the Agency's Headquarters, Regional and Field Offices, Research Centers, and specialized laboratories located throughout the country.

Approximately 75 attorneys and 4 paralegals from the Office of Regional Counsel all use the library's law collection for legal, legislative and business research.

The contractor shall provide law information services to all Region 4 patrons with the exception of tribal, state, local or environmental agencies or the general public.

The library's law collection consists of environmental and general law materials as well as internal EPA publications. The collection is divided into 3 parts:

- Treatises
- Reporters
- EPA monographs

Holdings are organized in accordance with the Library of Congress Classification System. Materials are classified and cataloged in accordance with the Anglo-American Cataloging Rules (AACRII), Library of Congress standards, and standard Agency procedures. The ORC Bibliographic Database (database) is the current tool used to browse and search library materials within the collection. ORC has recently migrated its bibliographic records to the EPA Online Library System (OLS). OLS is the Agency's national library catalog for holdings in the EPA Library Network. The Online Computer Library Center (OCLC) is the source of data for OLS which allows copy cataloging. Original cataloging is needed for items not in the OCLC.

Regional Records Management Program: The Regional Records Management Program supports all program offices within EPA Region 4 which may or may not have centralized Record Centers or File Rooms. Primary customers include EPA staff, state, tribal, and local government agencies, libraries, the regulated community, other EPA Regions and Headquarters, EPA contractors, and EPA grantees. The program includes organizing, maintaining and managing Agency documents and files throughout their life cycle, and collecting and inventorying records for on-site and off-site storage. It also provides the enterprise conversion support that enables records to be provided by the use of an Enterprise Content Management System (ECMS). The ECMS will bring electronic email records capture capability to the EPA, and eventually, implementation of electronic document and records management. The Records Management Program serves as the focal point for inventorying and archiving regional records, scanning and digitizing records, assessing the Region's records management needs, identifying and analyzing alternative records management approaches to meet these needs, and developing plans for the approaches chosen by the Region.

B. SCOPE OF WORK

The contractor shall provide library management services for the EPA Region 4 Library and Records Management Program, which includes enterprise content management (ECM) and imaging support to the Region 4 office for conversion efforts and vital records operations. Also, the contractor shall provide support for all record centers and/or file rooms for the following divisions and offices:

- Office of Regional Administrator (ORA)
- Air and Radiation Division (ARD)
- Enforcement and Compliance Assurance Division (ECAD)
- Laboratory Services and Applied Science Division (LSASD) - The contractor shall provide limited regional records management services.
- Land, Chemicals and Redevelopment Division (LCRD)
- Mission Support Division (MSD)
- Office of Regional Counsel (ORC)
- Superfund and Emergency Management Division (SEMD) - The contractor shall provide limited regional records management services.
- Water Division (WD)

The contractor shall perform the tasks and major subtasks to be performed are as follows:

Task 1.0 Regional Library Operations and Management

- 1.1 Regional Library Staffing
- 1.2 Circulation Management
- 1.3 Collection Management and Cataloging
- 1.4 Information/Research Requests
- 1.5 Electronic Services
- 1.6 Training/Library Outreach
- 1.7 New Technology

- 1.8 Mail Distribution
- 1.9 Regional Library Standard Operating Procedures Manual
- 1.10 Regional Library User's Manual

Task 2.0 Regional Records Management Support

- 2.1 Establishment of Federal and Agency Requirements
- 2.2 Records Management Support Services
- 2.3 File Organization, Storage, Retrieval and Destruction
- 2.4 Maintain Regional Record Center and File
- 2.5 Records Management Training
- 2.6 Electronic Database Management & Electronic Record Keeping System Support
- 2.7 Vital Records
- 2.8 Protection of Confidential, Sensitive and Off-Site Consequence Analysis Information
- 2.9 Records Standard Operating Procedures Manual for Regional Records and Divisions
- 2.10 Records User's guide

Task 3.0 Reporting Requirements and Communications

PART II—WORK REQUIREMENTS

TASK 1 –REGIONAL LIBRARY OPERATIONS AND MANAGEMENT

Regional library operations and management shall be consistent with the policies, procedures and practices of the EPA National Library Network.

SUBTASK 1.1 – REGIONAL LIBRARY STAFFING

The contractor shall manage all functions of the library. The contractor shall keep the Contracting Officer's Technical Representative (COR) and/or the Alternate Contracting Officer's Technical Representative (ACOR) abreast of library issues. The contractor may provide recommendations to the COR and/or ACOR. Only EPA employees shall make discretionary final decisions regarding library matters.

Requirements and Performance Standards

The contractor shall:

- A. Staff the library, with one (1) full-time Librarian during the operating hours of 9:00 a.m. to 3:00 p.m. daily (Monday – Friday, except Federal Holidays) with access to EPA employees and access to the public from 9:00 a.m. to 3:00 p.m. The Librarian must possess a Masters in Library Science (MLS) degree and have at least 3 years of experience with providing library services. The Librarian must have some experience with providing law research. The library averages about 50 patron visits per month.
 - 1. Perform quarterly shelf read and weeding. Conduct an annual inventory of the library's collection. The contractor shall also coordinate the preparation and digitization of the library's collection. The contractor shall maintain and update accurate lists of the library collection and resources (hardcopy and electronic). The contractor shall also maintain a separate list of items removed from collection (weeding) along with date of removal made

available upon request of the COR and/or ACOR. However, the completion date and number of updates and removal of collection activities are submitted in monthly reports. Monthly reports shall be factually correct and written in a clear and concise manner without typographical errors.

- B. The contractor shall operate and maintain the library area in compliance with regional standards, operating procedures, directives, and guidance. Guidance and policy may be found at the following site:
- C. Provide professional, courteous, and timely service to the EPA staff and the public. The contractor shall record the results from the tasks performed in the Monthly Technical Report.
- D. Monitor the library's collections and report any destruction, loss, excessive disorder, or removal of collections to the COR and/or ACOR. The contractor shall report security violations, including destruction, loss, excessive disorder, or removal of collections from the library to the COR and/or ACOR upon discovery and include this information in the monthly Technical Report.
- E. Maintain the library in an orderly and professional manner. Government furnished equipment, materials, and work spaces are available and neatly arranged. The contractor shall report malfunctioning equipment to the COR and/or ACOR upon discovery.

Subtask 1.1 Deliverables/Report Items

<u>Description</u>	<u>Delivery Date</u>
1. Technical Report including results from task performed	No later than the 10 th of every month
2. Collection Inventory	No later than 09/30 of each year

SUBTASK 1.2 – CIRCULATION MANAGEMENT

The contractor shall operate and maintain a library circulation system: (1) to ensure that Region 4 materials are loaned and borrowed according to Agency policies and procedures, and (2) to track circulation activity for retrieval, statistical analysis, and government decision-making. The contractor shall:

- A. Maintain circulation records and issue monthly notices of overdue status to borrowers
- B. Provide the COR and/or ACOR a quarterly report of overdue items.
- C. Provide monthly statistical reports of circulation activity for internal items and interlibrary loans (ILLs), which include the division breakdown along with the number of employees. The contractor's monthly reports shall be factually correct and written in a clear and concise manner without typographical errors. The contractor shall provide verification on the borrowing status of departing employees to the COR and/or ACOR, when requested.
- D. Maintain accurate records of items in circulation. The system shall be maintained and updated to ensure up-to-date records. Any problems with overdue materials past 3 months, or problems with the system in general, shall be immediately reported to the COR and/or ACOR.

Authorized Borrowers: Only EPA staff/grantees/contractors are eligible to borrow library materials directly. The general public and other entities are not eligible to borrow EPA library

materials directly, but may borrow through a public or academic library, using the Interlibrary Loan procedure.

Law Related Materials: Law library materials shall be loaned to Region 4 attorneys only.

Loan Period: The loan period for borrowers is three (3) weeks; however, the loan period may be changed if approved by the COR and/or ACOR.

Subtask 1.2 Deliverables/Report Items

Description

Technical Report including results from subtasks performed

Delivery Date

No later than the 10th of every month

SUBTASK 1.3 – COLLECTION MANAGEMENT AND CATALOGING

The contractor shall develop, maintain, inventory, track, and provide access to the library collection of books, reports, technical documents, serials (i.e., magazines, journals), newsletters, conference proceedings, maps, charts, microfiche, electronic information services, special collections, CD-ROMS, and other documents and reference materials. They shall be maintained in accordance with agency policies and standard professional practices. The EPA Online Library System (OLS) is the Agency's national library catalog for holdings in the EPA Library Network of libraries and contains bibliographic citations for books, EPA and other Federal Agency's technical reports, conference proceedings, indices, audiovisual materials, maps, journals and a host of other items. The Online Computer Library Center (OCLC) is the source of data for the OLS which allows copy cataloging. Original cataloging is needed for items not in the OCLC. The contractor shall follow the standard Agency procedures for cataloging. The contractor shall catalog on a very limited basis, only when needed as a backup to the AWBERC. Items are cataloged according to the Anglo American Cataloging Rules (AACRII) as well as the Library of Congress standards relevant to subject headings and properly labeled with call numbers according to LC classification scheme. The contractor shall update and maintain the pocket parts and bound volumes for the federal and state reporter systems, laws, regulations, guidance, legal encyclopedias, treatises and Restatements of the Law.

Additionally, the contractor shall:

- (1) Provide collection development and recommendation for improving Regional holdings.
- (2) Conduct an annual inventory to confirm what is listed in catalog database (i.e. – OLS) is consistent with shelved library items.
- (3) Coordinate cataloged items with AWBERC and prepare labels for Region 4 items to be cataloged.
- (4) Update the region's cataloging procedures.
- (5) Provide support to the EPA Library Network.
- (6) Coordinate core services with the AWBERC such as interlibrary loans, cataloging, online literature searches, and reference/research requests that are not physically maintained in the Library.
- (7) Coordinate distribution of the Code of Federal Regulations (CFR) to regional staff.

Requirements and Performance Standards

B. Interlibrary Loans (ILL) – The contractor shall serve as the liaison for filtering Region 4 borrowed materials back to AWBERC from Region 4. The contractor shall:

1. Process requests for ILLs for documents physically maintained in the Library. The contractor shall provide ILL support services using American Library Association/ILL procedures and guidelines. ILL service provides the capability to lend and borrow material to or from the EPA Library Network or other federal, academic, and special libraries, and quickly make it available to EPA staff. The contractor shall maintain accurate records in accordance with existing copyright laws, shall retrieve ILL materials from patrons in time to adhere to all ILL loan periods, and shall contact patrons via email, phone, and on-site office visits to ensure EPA materials are promptly returned from other libraries.
2. Forward requests for interlibrary loans, for items not maintained in the library, to the AWBERC. AWBERC will process all borrowing requests for collections that are not physically in the Region 4 Library.
3. Submit monthly reports to the COR providing the number of ILL requests processed, transferred back to AWBERC and the number of ILL requests remaining to be transferred and/or processed, if any. The contractor shall provide monthly reports that are factually correct and written in a clear and concise manner without typographical errors.

All requests for ILL (not in Region's physical possession) are properly transferred to AWBERC upon receipt of patron requests. All ILL *lending* requests for collection in the Region's physical possession shall be handled within 5 business days, under normal circumstances. Monthly reports shall be provided within required due dates and include accurate statistical information. Performance shall be determined by the COR and/or ACOR through the monthly reports and customer feedback.

C. Cataloging – The contractor shall serve as liaison for forwarding Region 4 collection of books, documents, dissertations, journals, microfiche, multimedia products, etc., to the AWBERC for input to OCLC and transfer to the EPA Online Library System. The contractor shall:

1. Identify and compile all Region 4 collections to be cataloged.
2. Photocopy the collection or document cover (e.g., front of book cover), table of contents, index, and verso (or back side of title page) of the collection and forwarded electronically (email, facsimile, or Intranet online request form) to the AWBERC. Maintain a list of items transferred.
3. Prepare appropriate labels for Region 4 collection and add to shelf collection.
4. Submit monthly reports to the COR providing the number of items transferred and the number of items remaining to be transferred, if any. Monthly reports shall be factually correct and written in a clear and concise manner without typographical errors.

D. Digitization of Documents – The contractor shall identify and prepare library documents and/or collections (i.e., reports, etc.) to be boxed and shipped for digitization and added to the online National Service Center for Environmental Publications (NSCEP), formerly called National Environmental Publications Information System (NEPIS) available at www.nepis.epa.gov.

1. The contractor shall identify Region 4 documents and collections not already in the NSCEP for digitization.
 - a. Assist EPA in developing procedures to capture and archive new Agency documents electronically at the point of content in coordination with NEPIS, the Online Library System
 - b. Assist EPA in developing procedures to digitize older reports that currently exist only in paper or microfiche.
 2. The contractor shall prioritize and package documents and/or collections in suitable boxes for shipping according to the established Agency procedures for digitizing and dispersing library collections. Ship boxes to the AWBERC for digitization into the NEPIS database and/or a final repository location.
 3. The contractor shall maintain a list of documents or collections shipped to AWBERC.
 4. The contractor shall ensure documents or collections are placed in proper repositories after digitization is completed.
 5. The contractor shall ensure that the library collections are properly identified, shipped according to established procedures, and available in the NEPIS database.
- E. The contractor shall provide support by verifying the services or collections transferred by the Region 4 Library to the AWBERC. The contractor shall ensure that accurate information will be transferred and verification of receipt by AWBERC will be obtained within 24 hours of transfer.

Subtask 1.3 Deliverables/Report Items

Description

Technical Report including results from subtasks performed

Delivery Date

No later than the 10th of every month

SUBTASK 1.4 – INFORMATION/RESEARCH REQUESTS

The contractor shall provide quick ready and extensive ready reference research services to EPA staff and the public. The EPA standard is 15 minutes or less to complete for quick ready reference and over 15 minutes to complete for extensive ready reference. The contractor shall provide the requested information, but shall not interpret agency policy or answer questions concerning technical policy issues. Questions related to program related areas or functions are referred to the appropriate division office contacts for handling and resolution.

The contractor shall provide legal research, corporate and legislative histories, business and individual background searches. Legal research, corporate and legislative histories, and business and individual background searches provided involve multiple information sources that are compared and contrasted using criteria such as timeliness, accuracy, relevance and reliability. The contractor shall search using the following electronic information sources: Accurint, Advanced Google Searching, Courtlink, Dun and Bradstreet private portal, Dun and Bradstreet Product, Equifax ePORT, Georgia Superior Court Clerks Cooperative Authority, Heinonline, Mergent Online, LexisNexis, Pacer, Shadow Law, and Westlaw. The contractor shall perform complex legal research using the federal and state reporter systems, laws, regulations, guidance, legal encyclopedias, treatises and Restatements of the Law.

Periodically, the contractor shall go to local libraries at universities or law firms to conduct research. If the contractor discovers that the information requested by EPA Region 4 Attorneys or other staff can only be obtained at a local research library, the contractor shall notify the COR and/or ACOR to obtain approval to conduct off-site research.

Absent advance written approval from EPA's Office of General Counsel, the contractor shall not provide legal services under this contract.

Requirements and Performance Standards

- A. Quick Ready References - The contractor shall respond to quick ready reference inquiries from EPA staff and the public, only as it relates to the Region 4 Library's collection, by email, telephone, inter-office mail, regular mail, fax, or in person. However, all general quick and extensive reference inquiries that do not relate to the Region 4 Library collection are transferred to the appropriate EPA program office or AWBERC for handling and resolution.
- B. Extensive Ready Reference – The contractor shall process inquiries (or information requests) from patrons within the stated timeframes, complete and responsive to the needs of the patrons. All rush ready reference must be handled within an hour of receipt. Process all extensive ready reference requests within 24 work hours. All requests that should not be handled by the Library are properly transferred to the appropriate office within 24 work hours. The contractor shall refer complaints to COR and/or ACOR. Handling of requests are properly documented and reported to the COR monthly. The contractor shall provide periodic progress reports (via email, phone calls, etc.) to the requester until the request is completed.
- C. General Inquiries-Non-Library - The contractor shall forward general inquiries received pertaining to non-Library Region 4 collection materials to the designated staff within the Outreach & External Engagement Office. Inquiries received that are related to specific program areas are electronically forwarded or transferred to appropriate program offices for their direct response to the patron. Requests are transferred or forwarded to appropriate program offices by the next business day following the request.

All responses to inquiries shall contain EPA approved information. At no time shall contractor staff respond with opinions, whether they be the personal opinions of the contractor staff members, the opinions of the contractor as a corporate entity, or the personal opinions of government officials or representatives who have assisted in providing the response. The contractor shall especially be alert to ensure that opinions concerning EPA policy and policy interpretations of statutes or regulations are not part of any response to persons seeking assistance. Any information request, especially involving legal, policy interpretations and/or a highly technical response that cannot be answered readily from EPA approved materials shall be referred to the appropriate EPA personnel to obtain a response. Information requests which are forwarded to EPA personnel will be documented, along with the response, in the Monthly Report. The Government shall furnish the contractor with a list of subject-matter contacts within EPA (including the regions, where appropriate) to consult when researching answers to questions. The contractor shall maintain this list and shall provide the COR and/or ACOR with an updated contact list upon request and at the conclusion of the contract.

- D. The contractor shall forward all environmental complaints or violation within 2 days of receipt to: <http://www2.epa.gov/enforcement/report-environmental-violations>

- E. The contractor shall forward inquiries for Agency records, or if inquiry received may be answered by responsive documents maintained in program offices as outlined in the standard operating procedures, to the Regional Freedom of Information Act (FOIA) Office within 2 days of receipt.
- F. The contractor shall maintain a complete record on the status and handling of all information or research requests. The contractor shall report the statistics on the number of responses completed, source of request (from whom), method of receipt (how received, e.g., telephone, work email, Internet/Intranet, central email box, fax, etc.) on requests for collection of materials physically located in the R4 Library. The report shall include the number of requests transferred and to which program office requests were transferred.

Subtask 1.4 Deliverables/Report Items

Description

Submit monthly reports providing the number requests responded to

Delivery Date

No later than the 10th of every month

SUBTASK 1.5 - ELECTRONIC SERVICES

The contractor shall provide routine non-web ready content to support the R4 Library internet and intranet web sites. Proposed content or revisions shall be submitted to COR and/or ACOR for approval. The contractor shall use various systems and/or tools to input and retrieve data on library documents and other EPA documents.

Requirements and Performance Standards

- A. The contractor shall recommend to the COR and/or ACOR revisions and additions to library information on the library's internet and intranet web site.
- B. The contractor shall develop new library information for web publication, e.g. New Books List, Library Newsletter, etc.
- C. The contractor shall input library documents and other EPA documents into Versatile (EPA's records and documents tracking system) as needed.
- D. The contractor shall use the Archives and Records Centers Information System (ARCIS) to assist records management staff with sending and/or requesting boxes of library documents or other EPA documents from the Federal Records Center and/or the National Archives.

Subtask 1.5 Deliverables/Report Items

Description

Technical Report including results from subtasks performed

Delivery Date

No later than the 10th of every month

SUBTASK 1.6 – TRAINING/LIBRARY OUTREACH

The contractor is encouraged to participate in EPA-specific training, conferences, workshops, seminars and library-related meetings to exchange information to enhance the library. The contractor shall develop

cooperative working relationships with library colleagues, including active participation in the EPA Library Network and contributing to network products, activities, and implementation of services. The contractor shall, upon the written technical direction of the COR and/or ACOR, attend EPA courses or seminars related to the library. Participation promotes improved access to information, documents, and library services. The contractor shall enhance patron awareness of library holdings and services by conducting library outreach and other library marketing services. The contractor shall develop and provide instruction/guidance materials and presentations to patrons about the library's collection and services offered in the Regional Library. All material and presentations created by the contractor must be approved by the COR and/or ACOR prior to distributing to library patrons.

Requirements and Performance Standards

- A. The contractor shall provide a written report of training attended and how the Region benefits from information received in the training to the COR and/or ACOR. Request for attendance of conference and seminars shall be submitted to the COR for approval. A summary report of information received from conferences or seminars is submitted within 10 business days of returning from the conference or seminar. All reports shall be factually correct and written clearly and concisely.
- B. The contractor shall actively participate in EPA Library teleconferences (such as the Library Network's Monthly Teleconference). Active participation in the EPA Library Network shall be determined through feedback and COR and/or ACOR review of contributions to network products and services. The contractor shall participate and report results in monthly report. Significant information received from the library network teleconferences shall be reported to the COR via email within 5 business days.
- C. The contractor shall develop and provide instructional training and guidance materials on the use and availability of library products and services when requested by the COR and/or ACOR. The contractor shall present 2 -3 training sessions per year. The contractor shall provide briefings/orientations for EPA staff, as requested. Materials developed shall be approved by the COR and/or ACOR and may include PowerPoint presentations, pamphlets, brochures, newsletters, and information notices about the services and products available, as well as current environmental information and issues to assist patrons in their program and/or public outreach awareness activities. Training, briefings, and/or guidance materials must be well organized, clearly presented with appropriate outlines and/or handouts. Materials developed shall contain no typographical errors and shall be relevant to the audience and/or work conducted by the EPA staff. The contractor shall submit to the COR and/or ACOR training activity reports within 5 business days of the training event. Performance will be measured by customer feedback and review by the COR and/or ACOR.

Subtask 1.6 Deliverables/Report Items

Description

Technical Report including results from subtasks performed

Delivery Date

No later than the 10th of every month

SUBTASK 1.7 – NEW TECHNOLOGY

The contractor shall research and recommend, as appropriate, upgrades to existing technology, equipment, and information technology advances, specific to library and law library applications that will improve overall library services and functions. The contractor shall provide to the COR and/or ACOR written recommendations

and supporting information about technological advances, equipment, and procedures as they become available. Recommendations shall be captured monthly within the Technical Report.

Subtask 1.7 Deliverables/Report Items

<u>Description</u>	<u>Delivery Date</u>
Technical Report including results from subtasks performed	No later than the 10th of every month

SUBTASK 1.8 – MAIL DISTRIBUTION

The contractor shall ensure that all mail received (i.e., journals, newsletters, etc.) in the library is expeditiously and properly sorted and delivered to the appropriate locations within the library.

Requirements and Performance Standards.

- A. The contractor shall promptly deliver to the COR and/or ACOR, all subscription renewals and invoices for library expenditures and/or services.
- B. The contractor shall receive, sort, and/or distribute mail daily by 2:00 p.m. each day.
- C. The contractor shall properly place receipt of updated library collections (i.e., magazines, journals, etc.) in the appropriate location in the library within 2 days of receipt. The Government will determine successful performance by customer feedback and by on-site review of the library collection by the COR and/or ACOR.

Subtask 1.8 Deliverables/Report Items

<u>Description</u>	<u>Delivery Date</u>
Technical Report including results from subtasks performed	No later than the 10th of every month

Subtask 1.9 STANDARD OPERATING PROCEDURES MANUAL (OPERATION MANUAL)

The contractor shall develop, maintain, and/or update the Regional Library Operating Procedures Manual. The manual shall be completed four (4) months after contract award and submitted for approval by the COR and/or ACOR. Subsequent reviews of the procedures manual shall be completed every six (6) months for additional modifications and updated accordingly, then submitted for approval by the COR and/or ACOR.

Subtask 1.9 Deliverables/Report Items

<u>Description</u>	<u>Delivery Date</u>
Regional Library Operating Procedures Manual	Initial draft due 4 months after award, subsequent updates are due semi-annually

SUBTASK 1.10 – USER’S GUIDE

The User’s Guide explains to EPA staff how to use and access library information. The User’s Guide shall be a one to two-page hand-out. The contractor shall keep the guide current at all times and copies are made available to users. The contractor shall develop any necessary materials (such as appropriate forms, filing forms, indexing forms, etc.) to go along with the User’s Guide and provide training on the proper use of the library when needed or requested by COR and/or ACOR (i.e., new employees using the library). The COR and/or ACOR must approve all materials before distribution.

Requirements and Performance Standards

- A. The contractor shall develop, maintain, and update the User’s Guide for the Regional Library. Information that shall be contained in the Regional Library’s User’s Guide shall include, but is not limited to:
 - a. how library holdings may be checked out (including interlibrary loans)
 - b. who may check-out library collections
 - c. how to request research to be conducted and response turnaround time
 - d. hours of operation
 - e. identify selected core services provided by the AWBERC and how to obtain information
 - f. policies provided by the COR and/or ACOR for the library
- B. The contractor shall develop, maintain, and/or update the User’s Guide four (4) months after contract award and submit for approval by the COR and/or ACOR. Subsequent reviews of the User’s Guide shall be completed every six (6) months for additional modifications and updated accordingly, then submitted for approval by the COR and/or ACOR.

Subtask 1.10 Deliverables/Report Items

<u>Description</u>	<u>Delivery Date</u>
Regional Library User’s Guide	Initial draft due 4 months after award, subsequent updates are due semi-annually

TASK 2: REGIONAL RECORDS MANAGEMENT SUPPORT

Records Management support includes organizing, maintaining and managing EPA documents and files throughout their life cycle, collecting and inventorying records for on-site and off-site storage, and educating EPA personnel on records management operations.

The contractor shall manage Agency records to include both hardcopy and electronic files. Services shall include:

- Organizing files of the program offices and divisions within EPA Region 4;
- Assisting with Records Management marketing campaigns;
- Assisting staff with updating office file plans;
- Conducting records management training for EPA staff, grantees and contractors;

- Administering record centers in the referenced locations; where applicable;
- Providing systems management, maintenance, and support for existing and new electronic Agency record systems {i.e., Versatile, Enterprise Content Management System (ECMS)};
- Providing records management support services associated with the preparation, duplication, maintenance, and retrieval of regional documentation.
- Prepping and scanning records to allow for storage in EPA's electronic record keeping system;
- Serves as a backup (serves as a greeter during temporary absence of the Regional Librarian. (greeting library visitors, answering phones, taking messages, etc.).

These services will be consistent with the EPA, National Archives and Records Administration (NARA), regulatory, and legislative requirements.

Place of Performance: The contractor shall perform Regional Records Management support on-site at EPA Region 4 offices (and maybe field offices), regional storage facilities (the Federal Records Center) and other facilities that may, at times, hold or destroy EPA records. The EPA Region 4 Office is located at 61 Forsyth Street, Atlanta, Georgia 30303, and storage/destruction facilities, and field offices are as follows:

(1) Records Storage Facility
Federal Records Center (FRC)
4712 Southpark Boulevard
Ellenwood, GA 30294

(2) Records Destruction Facility
Austell Box Board Mill
3300 Joe Jerkins Boulevard
Austell, GA 30168

(3) EPA Satellite Office
Laboratory Services and Applied Science Division (LSASD)
980 College Station Road
Athens, Georgia 30605

(4) Office of the Regional Administrator - Gulf of Mexico Division
Stennis Space Center, MS 39529-6000

**(The contractor shall provide limited remote regional records management services only – no travel will be required to this field office)

Some travel (3 to 4 days per week) between the Region 4 offices and local storage/destruction facilities for document/boxes review, pickup or delivery will be required.

SUBTASK 2.1 - FEDERAL AND AGENCY REQUIREMENTS

The contractor shall provide adequate and proper documentation to meet legislative, federal and agency requirements. The contractor shall preserve records, regardless of medium, and provide records management guidance and operational support services for the implementation of Region 4 records management policies, directives, and guidance that are consistent with EPA, NARA, regulatory, legislative, and operational requirements.

Requirements and Performance Standards

- A. The contractor shall provide adequate and appropriate documentation to verify that federal and agency standards for records management are met. This shall include all currently effective records management policies, directives, regulations, acts, guides, schedules, record center specific procedural and quality assurance manuals, training plans, materials, and monthly activity reports. The COR will review and approve the contractor's procedures, and monthly reports that address the Agency's requirements. The contractor's monthly reports shall be factually correct and written in a clear and concise manner without typographical errors.

Subtask 2.1 Deliverables/ Report Items

Description

Technical Report including results from subtasks performed

Delivery Date

No later than the 10th of every month

SUBTASK 2.2 - RECORDS MANAGEMENT SUPPORT SERVICES

The contractor shall perform tasks that include, but not limited to: operational procedures and standards, file organization and management, retention schedules, file plan updates, disposition of records, tracking systems, file review and inventory, information management, and electronic record keeping support in all areas of records management. The contractor shall manage and track regional off-site and on-site storage of Agency records through a record management system (i.e. Versatile and ECMS).

- A. Records Management Support - The contractor shall provide records management training, guidance and support to staff for various divisions and offices (services may be provided for one or more division simultaneously). The contractor shall offer guidance to EPA staff, grantees, and contractors in records management operations, processes, and procedures, when requested. The contractor shall develop work products (i.e. – file plans, records reference sheets, etc.) to assist program offices, that are complete and adequately documents the Agency's requirements. The COR and/or ACOR must review and approve work products. Support and assistance provided to program offices shall be documented in monthly reports. The contractor's monthly reports shall be factually correct and written in a clear and concise manner without typographical errors. Records Management Support shall be provided to the following divisions/offices: ORA, ARD, ECAD, LCRD MSD, ORC and WD. Limited records management support services shall be provided to the following divisions: LSASD and SEMD. In providing Records Management support, the contractor shall:

1. Assist divisional records staff and serve as a liaison between the divisions/offices and the Region 4 Records Officer, to include coordinating and disseminating information amongst divisions and program offices.
2. Ensure that EPA staff is made aware of their records management responsibilities and protecting records in accordance with federal and EPA requirements. Includes but not limited: respond to questions, provide directions where information is located, etc.
3. Create, update, and maintain file plans in hardcopy and electronic format specific to each division and/or program office; ensure that records are organized and can be found when needed.